CM/ECF Version 3.0

The United States District Court for the District of Oregon will upgrade the CM/ECF Application to Version 3.0 software on July 15, 2006. Information regarding modifications, enhancements and new functionality available with this new version of software is summarized below. The court has updated the CM/ECF Users Manual found at http://ord.uscourts.gov/ECF/CMECFHomePage.htm to reflect these changes. Questions or comments regarding these changes can be sent to info@ord.uscourts.gov.

New Features and Functions

1.0 Displaying Court Site Information to the Public
Certain court information now is available to public users without first requiring the users to log in to the application. The same information also is available to users who have already logged in. The new Court Information Program is available on the CM/ECF welcome screen and the Utilities menu. If the user clicks this item, either from the welcome screen or the Utilities menu, the following information is displayed: the name of the court, the version of CM/ECF the court is currently running, the date the court went live on CM/ECF, the file size limitation for documents, descriptions of public flags, the court's address, the court's phone number, the court's e-mail address, the court's hours of operation, the PACER Service Center's address, the PACER Service Center's phone number, and the PACER Service Center's e-mail address.

2.0 Restricting Access to Ex Parte Motions
The CM/ECF application was modified to accommodate the filing of ex parte motions. Courts now can limit access to ex parte motions to court staff, judges, and the attorneys for the filing party. Also, courts can limit access to documents filed by the court to the attorneys of the "applicable party," therefore only sending notice of the filing (and granting access to the entry and/or documents) to specific attorneys in a case.

★ Some system configuration will be necessary to implement this feature together with modifications to documentation, and attorney training. Target date for implementation will be September 1, 2006.

3.0 Docketing- Consolidated Cases

- **SpreadText**: Spread Text functionality has been improved to spread more data to member cases Jury Demand, Term Associations, Terminate Civil Case, Terminate Documents, Seal and Unseal. The **SpreadText** DPF displays the message, **"Do you want to spread this docket entry?"** The selection list of case numbers is now includes the judge initials and case title.

- **Associated Cases Query**: The output of the Associated Cases Query for criminal cases now displays the other court name and case number, not just the case number. The display of associations now includes terminated associations and the association end date. The associations are sorted with pending associations listed above terminated associations. This change was made for both lead-member and related associations.

4.0 Attorney and Party Processing

- **Add Attorney Record for Derivative Parties when Filing Cross Claims, Counterclaims, and/or Third Party Complaints:** When party records are added to a case during the filing of an event with a cross claim, counterclaim, and/or a third party complaint, now an attorney record is created for the derivative parties.

- **Display the Correct Address for Attorney in Pop-Up Window:** The pop-up window that displays the address information for an attorney during docketing now displays the correct address. Previously, the address that was displayed was not always correct for cases that were converted from ICMS.

5.0 Case Flags on Docketing Screens
Case flags will now appear during docketing at the top of each docketing screen, under the case number. If a case has many flags, and the display of the flags is greater than two lines, a small scroll bar appears on the right side of the list of flags so the user can scroll to see the additional flags. In associated case docketing, case flags from all the selected

cases appear on the screen, with a unique flag appearing only once.

6.0 Deadlines and Schedules

•   **Track Separate Deadlines for Multi-part Motions:** The application was modified to set and edit schedules on multi-part events on a per docket part basis. For example, when filing a Motion to Dismiss or in the Alternative for Summary Judgment, users will now see the display of two response deadlines in the transaction. The following reports and queries were modified to group together multiple instances of identically valued schedule records into a single display entry:

      •   Calendar Events Report
      •   Deadlines/Hearings Query
      •   Motion Query

7.0 Docket Text

•   **Properly Display the Dollar Sign ($) and Section Symbol (') in Docket Text:** Both the dollar sign symbol ($) and the section symbol (') now display properly in the final docket text of docket events. Previously, these symbols were translated into question marks by the application.

8.0 Notice of Electronic Filing (NEF)

•   **The E-mail Information Screen**: The E-mail Information screen continues to be the central location for maintaining and modifying all user-controllable settings for NEF e-mail transmission. This screen can be accessed via Maintain User Accounts. After the user enters an e-mail address in the proper format (a@b.c), the main options for that e-mail address appear. When an attorney is added to a case via docketing and an e-mail address is entered on the Attorney Information screen during this process, the attorney will receive NEFs. Prior to Release 3.0, electronic notification was not "activated" unless a court user accessed Maintain User Accounts to create an e-mail record for the attorney.

•   **Modify the Text that Indicates how the Notice is Delivered:** The wording on the NEF was changed as follows: "Notice will be electronically mailed to:" was changed to **"Notice has been electronically mailed to"** and "Notice will be delivered by other This new NEF suppression option should be used with caution since it suppresses all NEFs from being sent for a specific case, and no mention of this setting is made during subsequent docketing to the affected case.

•   **Modify the Text Used when No Document is Attached:** The text **"No document attached"** appears on the NEF when no document/document number exists for the docket entry or when no document is attached but a document number exists.

•   **Wrap the E-mail Addresses when Viewing the NEF via the "Silver Ball":** A comma and a space were inserted between the **bcc** e-mail addresses that appear on the NEF receipt when viewed via the "silver ball" on the docket sheet.

•   **Rearrange the Order in which Information Appears on the NEF** Information on NEFs is now displayed in the following order:

      Case Title
      Case Number
      Filer
      Document Number
      Docket Text
      Notice has been electronically mailed to
      Notice has been delivered by other means to
      Document Description
      Original Filename
      Electronic Document Stamp

•   **Modify the Transaction Information Text that Appears on the NEF:**   If an event is docketed by a court user, the following text appears at the top of the NEF, above the Case Title:

"The following transaction was entered on MM/DD/YYYY at hh:mm AM (or PM) and filed on mm/dd/yy."

If an event is docketed by an attorney user, the following text appears at the top of the NEF, above the Case Title:

"The following transaction was entered by <Attorney Name> on MM/DD/YYYY at hh:mm AM (or PM) and filed on mm/dd/yy."

- Additional information regarding user interface is available in the PDF document entitled <u>Notice of E-Filing - User Interface Information</u> found on the court's main web page and on the CM/ECF page: http://ord.uscourts.gov/ECF/CMECFHomePage.htm

9.0 Adding Attachments to Documents

- **Modify the Instructions for Adding Attachments to Documents:** When adding an attachment during docketing, the instructions for Step 2 were changed to:

  Before proceeding to step 3, describe the document using the Category list, the Description box, or both.

  On the Add Document(s) to an Existing Docket Entry screen in Edit Docket Entries, the instructions were changed to:

  Before proceeding to step 3, describe the document using the Category list, the Description box, and/or the Type list.

10.0 General Query Enhancements

- **Include All Pending Parties in the Case Summary Query:** All pending parties now are included in the Case Summary query. Previously, consolidated plaintiff and consolidated defendant parties did not appear in the output for the Case Summary query.

- **Provide a Hyperlink to the Docket Sheet from the Related Transactions Query:** A hyperlink to the Docket Report was added to the output screen for the Related Transactions query.

- **Properly Sort Party and Attorney Query Output:** The Party and Attorney queries now sort by case number: first by office number, then all four digits of the year, and then case type.

11.0 Reports

- **Add Nature of Suit to the Selection Screen for the Calendar Events Report:** Users can now select natures of suit from the selection screen of the Calendar Events Report. The nature of suit is displayed on the output of the Calendar Events Report as follows:

  7:05-cv-07200-EHE-TBT Napier v. Dee et al (Nature of Suit 130 - Miller Act)

- **Correctly Display the Case Short Title for Criminal Cases:** Short titles for criminal cases are now displayed correctly on the Calendar Events Report. The case title is obtained from the lead case record.

11.1 Criminal Cases Report

- **Properly Display Judge Name:** Judges' names now display properly on the Criminal Cases Report. Previously, a comma was printed between the first name and the last name (e.g., John, Smith).

- **Provide Subtotals Based on the Sort Criteria Selected by the User:** The Criminal Cases Report now provides subtotals based on the sort criteria selected by the user.

- **Display Report Heading Only at the Beginning of the Report:** The heading of the Criminal Cases Report now displays only at the beginning of the report. Previously, the heading was displayed in various locations when the report was printed.

11.2 Docket Report

- **Change the Display of the Case Number for Multi-Defendant Criminal Cases:** Previously, the word ALL was added to the end of the case number at the top of the docket sheet when the Docket Report was run for all of the defendants in a multi-defendant case.

- **Display Appellate Case Number on Docket Sheet for Cases on Appeal:** The appellate court name and case number now appear on the docket sheet if a case is on appeal and the appellate case number was entered either by docketing or via the Edit Case Associations utility.

12.0 Public Access

- **Provide Ability to Search the U.S. Party/Case Index by Attorney and Party Name:** The extractor was modified so the U.S. Party/Case Index now can be searched by attorney and/or party name. If a user wants to determine which cases a particular attorney is involved in, the user still has to access each individual court.

- **Allow PACER Users to Require Client Codes in Customized Formats:** The PACER Service Center now allows users to set formatting requirements for the Client Code field. Also, PACER users can indicate whether the Client Code should be mandatory when logging in to CM/ECF. To implement these new features, PACER users should go to the PACER Service Center website at http://pacer.psc.uscourts.gov and click on **Account Information**.

- **Provide Ability for PACER Users to Decide whether to Always See Billing Receipt:** PACER users now can determine whether they see billing receipts for every billable transaction. To set their billing receipt preference, PACER users should go to the PACER Service Center website at http://pacer.psc.uscourts.gov and click on **Account Information**.

- **Clarify the ECF/PACER Login Screen:** The ECF/PACER login screen was modified to include more detailed instructions to the users, so they will know which login is expected. Following is the new login screen.

- **Searching for Documents within a Case**: PACER users now can access PDF documents for a case without first running a Docket Report. The new View a Document item on the Query menu presents the user with a single text entry field. If the user enters a document number in this field and the document is available to PACER users or to the specific CM/ECF user, the Transaction Receipt is displayed. If the user clicks the **View Document** button, the document is displayed. This new query provides a way to access documents without first being charged to access the Docket Report.

- **Correct JavaScript Error on ECF/PACER Login Screen:** The "checkenter" JavaScript error that occurred when the user entered a value in the Client Code field was corrected. This error did not have any effect on the screen or the users' ability to login to the application.

- **Do Not Overcharge for Results from the Related Transaction Query:** The Related Transactions Query now bills only for the data that is displayed to the user. This change ensures that PACER users will not be overcharged for the results of the query.

- **Capture the Source IP Address for Each Billable Transaction:** The CM/ECF billing software now captures the source IP address for each billable transaction, and adds this information to the billing transaction file.

- **Accurately Charge for Results from the Docket Report:** PACER users now are properly charged for the output on the Docket Report.